

THE MODEL PARTNERSHIP



# Key Element **3**

## *A Well-Managed Organization*



Heron at Squaw Creek  
NWR, Missouri

FLICKR / JCPICS



Creating a successful Friends/Refuge collaboration is directly related to how well the Friends organization is managed, regardless of its size. Poor management predisposes the organization and the collaboration to failure. While Board members are responsible for managing the organization according to nonprofit principles, everyone in the partnership plays a role in assessing the effectiveness of management.

**T**his section highlights topics that mentors have identified as being the most common stumbling blocks for Friends/Refuge partnerships:

- Organizational Life Cycles
- Board Management and Structure
- Committees
- Meetings
- Communications Systems
- Membership Development
- Managing Finances
- Weathering the Storms

Each of these topics will be discussed in the following sections. The information provided should be viewed as a starting point. Readers are encouraged to become better informed on these and other topics by reviewing and discussing the resources listed in greater detail at the end of each section.

## Organization Life Cycles

All organizations go through well defined life cycles. Bruce Tuckman published a popular model in 1965, where he describes a cycle of stages that involve “forming, storming, norming, and performing” and notes that leadership styles change as teams mature. In 1975, Tuckman added a fifth stage, “adjourning,” as an adjunct to the stages. The first four stages relate to managing and developing a team, while this fifth stage is more relevant to the people and their relationships as a result of participating in the team. Characteristics of each stage are as follows (From Tuckman, 1965 and Chapman, 1995):

### Forming

- Team depends on leader for guidance and direction
- Little agreement on team aims, other than received from the leader
- Individual roles and responsibilities unclear
- Processes often ignored



### Storming

- Leader coaches
- Group decisions don't come easily
- Team members vie for positions and may challenge each other as they establish themselves in the team
- Clarity of purpose increases but uncertainties persist
- Cliques and factions form, and may become power struggles
- Team needs to focus on goals to avoid being distracted by relationships and emotional issues
- Compromise may be required to enable progress

### Norming

- Leader facilitates and enables; team shares some leadership
- Team forms agreement and consensus
- Big decisions made by the group; smaller decisions may be delegated to individuals or small teams within the group
- Commitment and unity is strong
- Team engages in fun and social activities
- Team discusses and develops its processes and working style

### Performing

- Leader delegates and oversees; team has high degree of autonomy
- Team has a shared vision, is clear about what it is doing and why, and is more strategically aware
- Team focuses on goals and uses agreed upon criteria to make decisions
- Disagreements occur but are resolved positively, team processes and structure are changed as needed

- Team members look after each other, and attend to relationships, style and process issues

### Adjourning

- Team task is completed and the group breaks-up.
- Team members feel good about what is achieved and move on to new things.
- Closely bonded team members may sense insecurity from the change

Other team development models have been described. Regardless of the model, it is clear that teams move through cycles of development; and most authors agree that there's no skipping of the steps—teams must work through each stage before moving onto the next. The stages are cyclical, meaning teams will revisit stages at various points along the way (e.g., when a major leadership change has occurred, or when a vision has been met or a strategic plan is completed). A performing group may go back to storming for a while as it revisits its direction.

It's helpful for Friends/Refuge partners to understand where the organization and partnership are in terms of life cycle. For example, some folks worry when the group feels stuck, but if everyone recognizes that the group is in a storming stage, they can set aside personal frustrations and work more readily through the issues at hand. If a performing team strategically plans for transitions (e.g., completion of major goals) and understands that growth means revisiting the storming period for a while, the team members may be able to more quickly move through the stage.



Different stages require different styles of leadership. Forming/storming groups will need a leader that provides more direction, while a performing group would be stifled by that style of leadership. A storming group that has a leader who delegates may struggle to move out of that stage because the group needs the guidance of a coach. Ann Smith, President of Friends of Black Bayou Lake NWR, reports that changing the style of leadership as the group's life cycle changed has been important to the success of her organization. Sustaining the collaboration means Friends/Refuge partners take the life cycle into consideration when they seek new leaders for the organization.

While we expect to sustain Friends/Refuge collaborations for the long run, the adjourning stage is still relevant and must be addressed as appropriate. Significant projects come to an end; people retire, move or step away; a vision can be accomplished—these are all endings of a sort, requiring a group to reevaluate and reconfigure. Sometimes changes are so significant they require partners to begin anew. Closure may create emotional turmoil for some individuals in the collaboration. The feelings must be acknowledged—sometimes with celebration, sometimes with honest discussion, sometimes with both. Recognizing adjournment as another stage in the life cycle of an organization can help members manage the change and move on.

Sustainable Friends/Refuge partners understand that life cycles affect leadership needs and organization performance capabilities. They use strategic thinking and planning to manage the organization and partnership. To learn more about organizational life cycles and evaluate the stage your organization is in, see the resources listed below.

### Additional Resources

Burns, Michael (1997). *The Juvenile Stage of Governance: What to do about Junior?* At Brody-Weiser-Burns <[www.brodyweiser.com/pdf/whattodoaboutjr.pdf](http://www.brodyweiser.com/pdf/whattodoaboutjr.pdf)>

Burns, Michael (1997). *The Organizational Life Cycle and How it Affects Your Board.* At Brody-Weiser-Burns <[www.brodyweiser.com/pdf/actyourage.pdf](http://www.brodyweiser.com/pdf/actyourage.pdf)>.

Heinze-Lacey, Beverly, Mehaffey, Maggie. (1997). *Taking Flight: An Introduction to Building Refuge Friends Organizations.* Washington, DC: NWRA, p. 48.



## On the Road to Performing

### The Friends/FWS Partnership in 2005

In July 2005, the Friends of Tennessee National Wildlife Refuge was a newly formed organization. The initial steps for establishing the organization had been completed and the group's next question was "What's next?" Mentors were invited to help the Friends/FWS partners formulate a plan of action for the future.

Mentors began the process with a period of exploration in order to learn about the refuge, the community and the partnership. The refuge encompasses more than 50,000 acres in northwest Tennessee that stretch for 65 miles along the Tennessee River. The Refuge headquarters is in Paris, TN, a farming community of approximately 10,000 residents (the 567 square-mile county has 30,000 residents). The refuge was not well known by residents in the surrounding communities. The key goal and challenge for the Friends/FWS partners was to engage and educate the community and build support for the refuge.

Mentors found the partners had a number of assets that would help solidify their collaboration and meet the challenges they faced:

- Friends and FWS members had established a positive, friendly personal relationship with each other.
- Friends board members had important connections in the community (local newspaper and key nonprofit and educational organizations).
- FWS staff and Friends members alike recognized they were responsible for helping the Friends to succeed.

Most notable was the willingness of the Friends and FWS members to enter the collaboration with an open mind and a desire to learn about each other and the possibilities for the partnership. > >

#### TENNESSEE AT A GLANCE

##### The Refuge

- Established in 1945 to provide food and protection for wintering migratory waterfowl and other migratory birds.
- Located in Paris, Tennessee (Pop.~10,000), the refuge's three units, Big Sandy, Duck River, and Busseltown, stretch for 65 miles along the Tennessee River.
- Diverse habitats include open reservoir waters, bottomland hardwoods, high quality oak/hickory forests, freshwater marsh, agricultural lands and moist soil managed impoundments. The refuge provides ample feeding, nesting and resting areas for many bird species, mammals, reptiles and amphibians, and fish.
- Visit <[www.fws.gov/tennesseerefuge](http://www.fws.gov/tennesseerefuge)>

##### The Friends

Established: 2005  
 Membership: 119  
 Annual Budget/Expenses: \$10–20,000  
 Visit <[www.tnwrfriends.org](http://www.tnwrfriends.org)>

##### Mission

To promote the natural and historical resources of the refuge, foster its use and enjoyment by the public consistent with the protection and preservation of its environment and engage in such educational, scientific and civic activities that will assist the management in carrying out its mandates.

##### Accomplishments

- Received a \$5,000 grant
- Contributed more than \$6,500 to refuge projects
- Shoreline cleaning project
- Sponsored four major Friends events

The focus of the mentors' visit was to set the stage for the future of the collaboration—to help the partners begin moving out of the forming stage and toward accomplishing their goals (norming and performing). During the meeting partners identified what they wanted the future to look like, what strategies they would use to create that future and what barriers might impact their goals. A number of goals and related strategies emerged from the session (see sidebar). The mentors left the partners with the challenge of prioritizing these goals and strategies and selecting the first projects to tackle.

As the mentors departed, the Friends/FWS partners at Tennessee NWR knew they had successfully moved out of the forming stage and into the storming stage.

## The Friends/FWS Partnership — One Year Later

In the year after the mentoring session, the Friends/FWS partners at Tennessee NWR experienced tremendous success and growth. First year membership goals were nearly met. Together they completed a major shoreline-cleaning project. The partners developed an effective relationship with their elected officials (US Congressman John Tanner and State Senator Roy Herron) who officiated at a new trail opening.

The Friends/FWS partners spent time learning about each other. Those efforts served to continually improve their working relationship and ability to effectively manage the Friends organization. The Friends also developed a newsletter, and established their website.

In a group interview with Dan Dziekonski (Friends President) and Anne Williams (Vice President), John Taylor (Manager) and Joan Stevens (Refuge Ranger), these collaborators discussed their first year's journey.

### **Q: What have been the key elements to the collaboration's success?**

*Dziekonski:* Several board members had prior personal ties to the refuge staff and manager, which made building the relationship easier. Mentors had suggested that the Friends' mailing address and all business be conducted in the refuge office. Sharing office space makes it very easy to have contact with each other—this has been really important.

*Williams:* Board meetings have included members of the staff who have come in and told us about their jobs on the refuge. This has been really helpful—it has given Friends members an understanding of staff concerns and ideas and made us better aware of where the Friends organization could be most helpful.

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*“What a great year we have had! Starting its second year the Friends of Tennessee Refuge already has over 60 members, thousands of dollars in the bank, has been awarded a \$5,000 grant, and Joyce (a Friends board member) is putting the final touches on a huge grant to restore the Chickasaw Trail. The Friends Group has already contributed more than \$6,500 to refuge projects and law enforcement support, and we have had two great Friends get-togethers. What can I say but ‘wow...you guys are awesome!’”*

John Taylor, Manager, Tennessee NWR, Friends Newsletter, January 2006

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*Taylor:* Engaging the staff in the mentoring session helped them accept the Friends. Before that, the staff wasn't really sure what to think about the Friends. Having staff attend Friends meetings gives them an opportunity to "toot their horn" and also gives them ownership in the success of the partnership. Also, in meeting with the board, I discuss things others may want to keep close to their chest. This brings trust into the relationship. Our Friends group is doing great things and it gives me lots of pride. I enjoy bragging about our Friends and staff to my superiors!

**Q: What have been the most difficult challenges?**

*Stevens:* The collaboration is evolving. We're still trying to figure out roles and how the Friends mesh with the Refuge. We're still going from project to project, but we're looking at exactly where we want to be in the future.

*Dziekonski:* One issue with start-up is trying to find expertise in different areas. We've had some frustrations with pulling together the newsletter and website. Things will get easier, and we know it takes time to see results.

*Taylor:* Developing a clear vision and becoming more noticed in the community. Membership development is, in itself, helping with this. We just have to work harder at making it such a fun group that everyone wants to join.

**Q: What are the two or three best things they've done over the last year?**

*Williams:* Getting the word out. When I talk about the organization, people have heard of us. We're getting the word out better than we thought.

*Dziekonski:* I'll second Anne. People who weren't at the trail dedication asked how it went—and these were people who aren't members.

*Stevens:* Attending the national and regional workshops. Board members that have attended have gained a much better and broader perspective for the Friends.

*Taylor:* As managers we're apprehensive about new things—we worry about time, the burden on staff—but the effort with the Friends has been value added. Opportunities have been presented and avenues have opened that up I wouldn't have expected before. We've let go of our fears!

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*“‘Don't fear.’ As managers we're apprehensive about new things—we worry about time, the burden on staff—but the effort with the Friends has been value added.”*

John Taylor, Manager, Tennessee NWR

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**Q: What's next?**

*Dziekonski:* We want to do more with environmental education. Joan's specialty is education and she is getting into the school system. We want to look for grants to bus kids out to the refuge for field trips. That's an immediate and attainable goal for the next six months.

*Stevens:* Our challenge is to broaden our scope, to expand the board or build more committees. We have a small pocket of people doing all the work and we need more to help.

**Q: What advice would you give others?**

*Dziekonski:* Don't be afraid to fail. Don't be afraid to try something new. If you do fail, chalk it up to learning. Writing down what went well and what could be done better will help with planning and improving things for the future. I was in the military and we had a motto: "Lead, follow or get out of the way." I think that's a good message for Friends—don't just sit still.

*Taylor:* Be very open and the Friends will do good things. Keep new and exciting things happening and build diversity. > >

## The Friends/FWS Partnership — Stepping into the Future

The Tennessee NWR Friends/FWS partners clearly have much to celebrate. They are well on the way to creating a vibrant, sustainable collaboration. They have begun norming and performing at many levels, but the partnership is still very much in the storming stage of development.

Friends President Dziekonski believes the next step is to prepare members to transition into a strategic thinking Board and partnership. He states, “Right now when we get to the point that we have checked all the boxes on our list, there isn’t a good method for adding new items and ensuring that they are consistent with the direction that we want to travel.” He worries about being too focused on the things that are finite and quantifiable. He states, “We could lay out goals based solely on [actions]...such as recruit 100 new members or develop 1.5 miles of new trails per year. We might accomplish every single one on the list, and yet be totally ineffective and dysfunctional as a group.” Dziekonski acknowledges the importance at this point in the organization’s history to develop *capabilities*: “I want a set of guiding principles or tenets that focus the efforts of the group. From that we can develop the specifics.... As the list gets completed, we have our principles to guide us as we explore new projects and goals.”

Doing the “process work” to become strategic is an important step in the evolution of a sustainable collaboration, one that may challenge members who feel more comfortable with tangible projects. The transition for these partners (and many other new Friends/FWS collaborators) will require a blend of continued work on concrete actions with regular discussion about the future. The transition into a fully performing collaboration may take a number of years, and will require persistent attention to vision, goals, relationship building and organizational development. □

## Tennessee NWR Friends Collaboration First Year Goals and Accomplishments

During the mentoring session, Friends members and FWS staff and managers developed goals and strategies to focus on during their first year. The prioritized goals are listed below, along with action items accomplished or nearly completed during the partnership’s first year.

### 1. Work on a variety of projects to develop or improve trails, photo blinds and habitat.

- Completed Britton Ford Trail
- Renovated Chickasaw trail
- Publicized the two trails
- Developed and printed refuge maps for sale
- Completed an outdoor classroom for environmental education programs
- Developed frequent “refuge helping” projects for members and community to become involved in

### 2. Develop a big roster of members and volunteers.

- Raise local awareness of refuge issues
- Hold Friends special events four times a year
- Develop strong attendance for annual membership meeting
- Involve local college students to help with activities

#### *Other anticipated accomplishments:*

- People in the community participating in some refuge activity and reporting a pleasant experience that they look forward to repeating
- 100 members — 20 corporate sponsors; 5 benefactors: increased membership, steady fund building and continued growth as an organization



**3. Friends will have a clear understanding of NWRS and TN-NWR and how Friends fit with the refuge. As a result, well-trained Friends board members will be able to develop and deliver a clear and consistent message.**

- Educate the Friends board: include training in the board meetings; offer field trips to the refuge; provide information about staff positions and refuge issues; have board members attend Regional workshops and Friends Conferences and training at NCTC for continuing education.
- Educate the Public:
  - Invite the public in for interesting and educational activities (3-4 times a year)
  - Increase involvement with local school/civic groups to promote the refuge and environmental education

*Other anticipated accomplishments:*

- Develop educational activities on the refuge for Boy and Girl Scouts, 4H and Explorer Club groups

**4. Advocacy.**

- Help the refuge gain better Congressional visibility and community support
- Congressman Tanner and State Senator Roy Herron officiated at Britton Ford Trail Dedication

**5. Transmit Refuge/Friends information to a wide audience. Establish communication between staff/Friends/public to promote membership, outreach, education, and projects.**

- Print quarterly newsletter by Friends group members
- Create membership mailing database
- Establish full service website
- Establish weekly communications between Friends group leaders and refuge staff
- Get weekly columns about refuge events and animals printed in local newspaper
- Develop outreach materials for the public (newsletters, leaflets, etc.)

**6. Raise funds.**

- Secured startup grant and applied for additional project grants
- Developed and printed refuge maps for sale

**7. Build and maintain a collaborative relationship between the Friends group and staff with common goals.**

- Become a sounding board for refuge ideas
- Have ownership in the refuge and its management
- Participate in planning quality “Big Six” activities to make citizens more aware of refuge mission
- Facilitate a joint Friends/refuge event/festival
- Provide activities for members that are fun, but allow them to appreciate the refuge and its operations.
- Work with Refuge and Friends towards common goals

*Other anticipated accomplishments:*

- The community of Paris loves Friends of TN-NWR
- Friends shows signs of stability and growth: more than 100 members; financially stable with funds allocated to finish projects begun; work on projects under way, and planning projects to come. All board members will know all refuge staff and all refuge staff will know all board members.

**7. Develop partnerships that will help the Friends and the Refuge.**

Although no specific action item has yet been accomplished in this area, relationships are being nurtured and partnership opportunities are being explored with local schools and a variety of environmental nonprofits and state agencies in the area. □



## Board and Structure

A well-functioning, well-organized, dynamic board is important for creating and sustaining a successful organization. Board development is an ongoing process that must be high on everyone's priority list.

### What Does the Board Do?

While overall success of the Friends organization is a partnership effort, the Board of Directors holds “the principal responsibility for fulfillment of the organization's mission and the legal accountability for its operations.” (O'Connell, 1993, p. 20).

Each board member is personally responsible for managing and leading the organization, according to O'Connell. He observes that:

*“On the most basic level, a board member should understand the mission of the organization, attend board meetings, serve actively on at least one committee, be certain that [he/she] and the board as a whole are in control of planning and evaluation, contribute to a sense of camaraderie and teamwork, and ask questions. It is fair to ask all board members, within their means and spheres of contacts, to contribute as much as they can and to help raise money.”*

## Nurturing and Transitioning Leaders

Finding good leaders for the board is cited as a common challenge facing Friends organizations. Rather than think strategically about how to attract and nurture appropriate leaders, many groups make the mistake of accepting whoever is willing to serve.

Attracting good leaders takes time, patience and planning. First, the Friends/Refuge partners must understand what qualities they need from their leaders. Depending on the organization's life cycle, different styles of leadership will be necessary: younger organizations generally need a President who can take charge, while older organizations will want a President who delegates and acts as a coach, with board members who hold themselves accountable.

Another step is to decide what jobs need to be completed and the specific skills required to complete them. Having a vision, goals and a plan in place will help determine the type of people needed for the board. O'Connell (1993) has suggested charting what skills are needed and then to seek people with the required skills. He writes:

*“Effective people turn down appointments [to boards or committees] not because they are uninterested, but because the assignments are put to them in such a vague way that saying yes could lead into a bottomless pit of responsibility. Often we ask a person to come aboard without making clear exactly why we want him to her and without breaking the task into reasonable proportions... The greatest temptation in recruiting volunteers is to*



*make the job sound easy...It is better to give the individual a clear picture of the assignment, so that when you get a yes, you will know you've got someone who is committed to getting the job done. It's better to get a few no's than to end up with someone who isn't likely to produce or who can't be held accountable because there is no mutual understanding of what is to be done."*

Friends/Refuge partners must have a system in place to nurture new leaders. The approach taken by the Friends of Willapa NWR has been to build three tiers of membership—The Board, Active Members, and General Members. This Friends organization nurtures leaders by providing many opportunities to engage and build relationships with its regular volunteers or Active Members. Active Members show they are committed to the organization's principles and the collaboration's vision—they become future board members.

The board needs to institutionalize regeneration of its members by restricting board terms in the organization's by-laws. A three-year term with a year off in between terms is a fairly common practice. Staggering terms is important to maintaining institutional memory. FWS Mentor Molly Krival writes, "Friends that do not restrict terms become overworked and seriously restricted in how they will choose and develop projects."

Thus board development should be high on every current board's agenda. Too often Friends/Refuge partners leave this to chance, and that may lead to an array of preventable problems. A stumbling block seems to be that partners have trouble

deciding where to begin. Members may say "but we don't know where to find anyone!" Molly Krival has defined a process (using an "Acquaintance Map," p. 105), based on work done by Terrie Temkin, Nonprofit Management Solutions, that will help identify potential candidates (Appendix D). For the longer term, partners need to establish ways to build the middle tier—active members who will become the source of new board members for the future.

Current board members should be encouraged to regard almost everyone with whom they come in contact as possible recruits. They can, start the cultivation process by sending these individuals newsletters and invitations to events. Thus, when it's time to nominate future board members, they should have a wide range of individuals from which to choose, based on the responses to their cultivation efforts.

One of the most important committees Friends Boards should establish is the nominating committee—a first step toward creating a culture of ongoing leadership development and transition.

### **A Well-Functioning Board**

The sustainability and success of a board is closely tied to the culture it creates. First, let's take a look at some board cultures that are *not* sustainable:

- The President (and maybe one or two others) does all the work. Board members rarely offer suggestions or agree to lead initiatives. Long-term outcome—The leader burns out and steps down, and no one is willing or able to lead the organization.

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### **A Guide for Defining Board and Committee Member Roles**

- Does everyone have a job?
- Does every job have a title?
- What is the purpose of the position?
- What are the key responsibilities?
- What are the qualifications required?
- How much time must be committed?
- What does the organization commit to the individual?
- Is there an agreement form?

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From Molly Krival, FWS Mentor, "Ding" Darling Wildlife Society adapted from NonProfit Management Solutions, Inc. 1999

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- Meetings drone on for hours, few decisions are made, no one is held accountable for following through on actions, and little is accomplished. Long-term outcome—board members drift away, no prospects can be found to fill their places, enthusiasm is lost and the organization crumbles.
- One or two board members are demanding and outspoken while others rarely voice their opinion. Decisions are driven by the most outspoken. Diversity is lost. Long term outcome—the organization is viewed as an elitist club, Board members drop out, the remaining board loses sight of its mission and vision, and the collaboration suffers or collapses.
- Meetings are spent criticizing plans and programs that never meet the particular standards of various board members. Members feel attacked and unappreciated. Long-term outcome—new initiatives disappear, board members quit and a negative culture prevails that prevents realization of goals.

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*“Emphasis needs to be placed on respect for everyone’s accomplishments and ideas. Personal attacks should not be tolerated. We accept that people have differences but discussions...should seek diversity rather than punishing it so that decisions will be made with the widest available options. Many boards and committees seek quick decisions by an ‘in group’, ostracize those with different ideas, and end in serious conflict and less effective decisions.”*

Molly Krival, NWRS Friends Mentor

It’s easy to fall into one of these (or other similarly destructive) board cultures. Each person brings different talents, personalities, communication styles, values, and interests to the organization. The challenge is to create a setting that support each person’s talents and brings out his or her best while setting limits on unproductive or damaging individual behaviors.

Here are some key areas partners can work on to move toward a well-functioning board:

### **Give everyone a job**

The executive team (President, Vice President, Treasurer and Secretary) have specific roles regarding the leadership of the organization (for more information, see resources below). The other board members also need well-defined jobs. These should be described in writing and provided to prospective members before they join the board. Board members should be expected to lead a committee, which includes identifying committee members and finding a replacement for themselves if they need to step down. Giving board members specific jobs and holding them accountable helps sustain the organization. Clearly defined jobs will also help attract and identify new leaders and ultimately should help increase job productivity.

### **Nurture relationships**

Nurturing relationships is as important to board functioning as it is for the collaboration overall. Board members who don’t know each other will have difficulty working together. Set aside some meeting time for board members





to learn about each other. This should be done when new members come on board and at regular intervals throughout the year. Understanding each other's personal interests ("What's in it for me?"), personalities, talents and working styles helps everyone work better together. Celebrating is an especially helpful tool for building camaraderie and should be integrated into the board culture as a regular activity. Plan enjoyable outings together (e.g., hiking the refuge, birding) to learn more about the refuge and each other.

Leading an organization demands a lot of board members. Successful partners create a culture where everyone agrees that nurturing board relationships is a priority.

### **Expect accountability**

*Everyone* must agree to hold him/herself accountable to the organization and to each other. This is not solely the job of the board President but extends to all board members and Refuge partners, as well. Board members should sign a written agreement that outlines their responsibilities. These agreements clarify what's expected and formalizes the process by having the member sign a written commitment.

Another tool to hold members accountable is to structure board meetings around the vision and action plans, where each board member is expected to report on progress made toward accomplishing his or her assigned projects. Board members who cannot or will not fulfill their responsibilities should be asked to step down. This meeting format creates a culture where members are held accountable and makes measuring progress and performance relatively easy.

### **Honor diversity**

A diversity of talents, skills and personalities enriches a board but it may also lead to conflict. Personalities can clash, working styles may differ and values may vary. To avoid or minimize conflict, boards sometimes resort to squashing divergent ideas, ignoring the more quiet members over the assertive ones or skirting difficult issues. These avoidance actions cause distrust, and they can result in dissatisfied members and lackluster performance. These pitfalls can be prevented by nurturing stronger relationships and using techniques that encourage participation (see sections that follow for further discussion).

### **Become well educated**

Board members must learn about their refuge and the FWS—and become well educated about nonprofit management. Temkin (October 23, 2003) identifies five actions required of board members to fulfill their responsibilities to the organization:

- Read and understand financial statements.
- Be familiar with indicators that report the status of the organization. These indicators are set by the board, (e.g., membership data, expense and revenue projections) and should be presented at each meeting to help members make strategic decisions.
- Be knowledgeable about the mission, vision, values and goals of the organization and understand what criteria will be used to screen decisions.
- Come to meetings prepared (e.g., read materials and clarified questions in advance of the meeting).



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*Refuge staff is integral to the effective work of Friends. There should be multiple opportunities for staff to share their professional goals and methods with the Friends and they should be recognized and applauded as well as Friends. Failure to do this often leads to misunderstanding, loss of effective support and loss of goodwill from both groups.*

~Molly Krival, NWRS Friends Mentor

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- Ask questions (e.g., Why do we want to do this? How will this decision affect our members, the refuge? What are the downsides?).

Ongoing education must become part of the board culture. Board meetings can include an educational component, or certain meetings (e.g., every third meeting) can be set aside specifically for training purposes.

The FWS and the National Wildlife Refuge Association offer national and regional workshops that provide education on a wide variety of topics important to Friends Board members. Some Friends groups have joined forces and organized meetings to discuss mutual topics of interest. Universities and private corporations and nonprofit groups offer an abundance of websites, books and workshops, as well. To create a sustainable organization, board members must use these resources and become well educated about what it takes to manage their nonprofit organizations.

### Additional Resources

Brody-Weiser-Burns (5/10/02). *The Board Chair* at <[www.brodyweiser.com/pdf/boardchair.pdf](http://www.brodyweiser.com/pdf/boardchair.pdf)>

Heinze-Lacey, Beverly, Mehaffey, Maggie. (1997). *Taking Flight: An Introduction to Building Refuge Friends Organizations*. Washington, DC: NWRA.

O'Connell, Brian. (1993). *The Board Member's Book, 2nd Ed.* New York: The Foundation Center

For a wealth of board management resources see NonProfit Management Solutions at: <[www.nonprofitmgt solutions.com](http://www.nonprofitmgt solutions.com)> □

## Managing Transitions

The Friends/Refuge collaboration at Squaw Creek NWR in Missouri was an outgrowth of a relationship with two different Audubon societies that had adopted the Refuge in the late 1980s. In 2000, members of the newly forming Friends organization sat with Manager Ron Bell to chart the future of their partnership.

Squaw Creek NWR is a well-visited Refuge (120–130,000 visitors per year); but in 2000, it had few facilities or programs for reaching the public. The partners recognized that the Friends could play a significant role in improving facilities and making connections with the public.

The Friends quickly set their attention to raising funds and building their volunteer base. The Friends first President, George Scheil, was well connected in the community and was instrumental in raising significant funds from a variety of sources, including the FWS Regional Office. In the following years, they have achieved many significant accomplishments (at right). They now have a membership of about 145 people and an annual budget of approximately \$45,000.

Through their fundraising efforts, the Friends organization has raised the visibility of the Refuge in the surrounding communities, and this support continues to grow. The Friends/Refuge collaboration has helped Manager Ron Bell make connections and improve the Refuge's working relationship with the community. "In the past there were lots of local rumors, but now people in the community get information directly. Everyone is better educated about the Refuge."

Bell and Friends President, Tommie Rogers, agree that communication is a key element to their successful partnership. They worked together to identify board members and educate them about their roles and expectations of the Friends/Refuge partnership. All board members have specific jobs, such as managing membership, overseeing finances or coordinating projects.

Friends President Rogers says she's involved because she loves nature: "I enjoy observing wildlife and especially wild birds so much. I want others to know what the refuge has to offer. If people don't come out here, they are missing something so special and unique in the state of Missouri. We have thousands of birds, butterflies, dragonflies and such a variety of snakes. Squaw Creek is an important stopover for migratory shorebirds, waterfowl > >

### SQUAW CREEK AT A GLANCE

#### The Refuge

- Located in Mound City, Missouri (population ~1,100), a rural area.
- Established in 1935 as a resting, feeding and breeding ground for migratory birds and other wildlife.
- 7,350-acres located along the Mississippi Flyway in northwestern Missouri within the historic Missouri River floodplain.
- Best known for its large concentrations of snow geese, other waterfowl and bald eagles. The refuge is a major stop-over for waterfowl, with more than one-half million birds in the fall and lesser, but still spectacular, numbers in the spring.
- Visit <[www.fws.gov/midwest/squawcreek](http://www.fws.gov/midwest/squawcreek)>

#### The Friends

Established: 2001  
 Membership: 145  
 Annual Budget/Expenses: \$40–50,000  
 Visit <[www.squawcreek.org](http://www.squawcreek.org)>

#### Mission

To promote the preservation of the natural and historical resources of the Refuge

#### Accomplishments

- Constructed Auditorium: \$277,919
- Constructed Outdoor Classroom: \$10,017
- Constructed Callow Trail: \$20,600
- Funded printing of Refuge brochures
- Trumpeter Display: \$600
- Propane pump: \$7,400
- Provide office staff on weekends.

and songbirds in spring and fall. And the refuge rivals some of the birding “hotspots” in the United States. There is always something for people to see when they visit.”

The Friends/Refuge partners focus their energy to make volunteering a positive social experience. Volunteers have many opportunities to interact with the public and each other. Rogers believes that volunteers keep coming back because the experience is so enjoyable and rewarding.

The Friends and Refuge at Squaw Creek have established a trusting, respectful and productive collaboration. Nonetheless they share wholesome concerns about the future. Rogers anticipates a move out of the area and George Schell, their first President, is currently unable to return to his former leadership role. Thus, the Friends board faces its second major leadership transition.

This highly functional collaboration experiences its growing pains as the partners consider how to sustain momentum through a leadership change. The partners recognize that everyone has a responsibility for ensuring the success of the Friends organization. Board President Rogers and Manager Ron Bell set the pace by striving to meet new members of the community, learning about their interests and considering their potential skill sets with the needs of the partnership. Such outreach efforts often lead to new members and volunteers and may ultimately generate new leaders on the board.

Bell has noted, “We’re still growing. There have always been speed bumps along the way, but it’s a growing venture.”

The growing pains and “speed bumps” at Squaw Creek are common experiences for Friends/Refuge collaborations around the country, especially in rural areas where volunteers can be hard to find. The Squaw Creek example shows how important it is for partners to work together to consciously manage their future. Over the years this collaboration has developed a number of attributes that will help sustain them through the transition. Among their collective strengths are strong personal relationships with each other and the community, a broad volunteer base, a shared vision for the future and the rewards everyone has experienced from participating in the collaboration. By thinking strategically and focusing on their strengths, the Friends/Refuge at Squaw Creek will ensure their relationship continues long into the future. □



An egret fishing at Squaw Creek NWR

FLICKR / BRENT FULTON





## A Strategic Approach for Creating a Vibrant Board

Beverly Arnoldy was the second President of the Friends of Willapa NWR. After being President for over three years, she said it was time to pass the reins to a new President.

Arnoldy had thought about the task of finding a suitable successor since she agreed to take the job three years prior. An experienced nonprofit manager, she knew that organizations need dynamic leadership. She also knew that the board members had to build leadership development into day-to-day management if they wanted the organization to survive and thrive.

Arnoldy had no refuge experience when she first encountered the Friends of Willapa NWR at a booth during a local festival. She was new to the community and could see the refuge from her house. She wanted to make a connection and understood the potential value of her background in nonprofit management. She joined the Friends and quickly received an invitation to serve on the board. And soon thereafter, she was elevated to Friends president. “It’ll be easy’ the other board members told me! Well, it *wasn’t* easy,” Arnoldy recalls, “but at least I was familiar with the challenge before I accepted the job.”

Arnoldy identified two problems that required immediate solutions before the group could move ahead. First, she noted, “The board was burnt to a crisp.” And second, there were just two board members doing all the work—with the expectation was that Arnoldy would also be a worker.

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### Healthy organizations have three tiers

- The Board
- Active Members
- General Membership

The middle tier is made up of active members who volunteer, but aren’t on the board—these are the people who will become board members of the future.

Beverly Arnoldy, President, Friends of Willapa NWR

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This second problem resulted from the lack of a process for cultivating leadership. It was a “two-tiered organization” made up of board members and the general membership. Arnoldy reports that healthy organizations have a third, middle tier: the active members who volunteer regularly but are not on the board. This corps of active members are the people who will become board members of the future. “You must have a good middle tier to grow and stay vibrant,” observes Arnoldy. “We didn’t have those active members.” Her primary goal for the organization was to create this middle tier.

In her first year as president, Arnoldy instituted two changes: monthly board meetings and a requirement that board members attend every meeting, “Some board members,” she notes “resigned as a result.”

In Arnoldy’s second year as President, the board agreed to reduce their number from nine to seven. They found four new people who were committed to working to replace departing board members. Two of these people remain on the board. Arnoldy notes, “It takes a while to find the right people for the board. I didn’t know the community at first and it took a while to get to know people and find appropriate matches.” > >

In her fourth year, Arnoldy observed, “We have a great board. We have the same goals and same vision and everyone is committed to working.” She instituted jobs for each of the Board members, matching skills with organizational needs. For example, the Vice President, a high school science teacher, is in charge of the Environmental Education program. Other directors take charge of membership, publicity, refuge projects and volunteer coordination. For the first time, they have a nominating committee tasked to identify and recommend new candidates for the board. It took three years to get to this point. The old system — “take anyone willing to join the board” — simply was not meeting the collaboration’s long-term needs.

Arnoldy believes board members must always address how to develop the middle tier and nurture the leaders of the future. Her formula also includes a healthy quotient of enjoyable activities for members and board alike: “If people have fun they will come. If you offer regular venues for education and enjoyment, they’ll come back again and again. Volunteerism is a choice. If you provide enjoyable experiences, and this happens repeatedly, these people will become your active members.”

Being “burnt to the crisp” is no longer part of the culture of the Friends of Willapa NWR’s board. With a handful of patient, strategic choices, they made important strides toward becoming a dynamic and sustainable board. □



### Committees

Decision making becomes faster and more effective, Karen Ray has noted, as power to make decisions is delegated to appropriate subgroups. She also added that decision-making structures and processes are closely tied to trust. The more partners trust one another, the easier it is to delegate decision making.

A working board will most commonly manage young Friends organizations. This means that the board members discuss and work on all of their projects. But as the vision, mission, goals and action plans of the organization become more defined, it will become harder to address all issues during a regular board meeting. The board will eventually need more people to accomplish the necessary work and will want to move into a committee structure. Spreading the work to committees is an important step in creating a sustainable organization. Indeed, Ron Tillier, an FWS mentor and former President of Friends Blackwater NWR (1999–2005), reports that moving into a committee structure transformed the way this Board functioned and laid the foundation for the organization's current level of success (See Profile, Blackwater NWR, p. 88).

Committee development is a tool to begin creating the “middle tier of membership” described by Beverly Arnoldy of Friends of Willapa NWR (See Profile, Willapa NWR, p. 57). Members must be careful to form committees for useful purposes; Ad hoc committees that form around a specific project and then disperse when the project is completed are better than long-standing committees that wind up with little to do. There may be some committees that should endure: the nominating committee, for example, is very important because it is responsible for sustaining and regenerating the board.

As Friends/Refuge partners establish committees, they should consider the following:

- *A committee should be established with a particular purpose in mind, not just for the sake of having one.* This purpose and expected outcomes should be clearly defined and communicated. Committees, ad hoc committees, subcommittees and even task forces should have a written charge. Members sometimes mistakenly assume that everyone on the board has a common understanding of the task to be accomplished. Committees, and their subsets, should review their charge on a

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*“I firmly believe that the way the Board is structured is critical to how the group works. We used to have meetings that were three to three-and-a-half hours long — everyone got into everyone else’s business and chewed up ideas.*

Ron Tillier, FWS Mentor, Friends of Blackwater NWR

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regular basis. It is important to keep in mind that not every Friends organization is ready for a committee structure. Young organizations cannot delegate leadership roles to committees (e.g., mission, goals, expectations, etc.). It is time to establish one or more committees only when specific projects or programs (such as membership or a fundraiser) can be defined (“written charge”) and delegated—and there is an active membership from which to pull volunteers.

■ *The board should be ready to empower the committees with decision-making authority.* No one wants to lead a team and have every decision questioned or criticized by the board. The purpose and expectations of a committee must be clearly defined—and appropriate authority granted—in order for it to make good decisions within the framework of its charter. While committee members are empowered by the board, they are still responsible for meeting board expectations, including providing detailed reports and regularly evaluating progress towards goals.

■ *Committee leaders and members need to be assigned.* Many Friends groups require board members to lead one committee and sit on another. They also expect committee leaders to find their own volunteers to work on the committee, as well as recommend their own replacement if they need to step down. And because this is a collaborative effort, committees must include members from both the Friends and the Refuge as appropriate.

■ *Communications systems must be established between the committee and the board.* Written reports should be provided to board members prior to meetings. This keeps everyone abreast of committee activities and allows for discussion and redirection, as needed. Systematic reporting also holds committee members accountable.

Terrie Temkin offers twenty-six steps regarding how committees function (see <[www.nonprofitmgt solutions.com/boardgov.html](http://www.nonprofitmgt solutions.com/boardgov.html)> for the complete article). Some of the suggestions she makes include:

- Be clear about what is expected of committee members (time, skills, contacts, money).
- Limit committee discussions to topics that fit the organization’s mission, vision, values and priorities.
- Meet only when there is something substantial with which to deal.
- Assign tasks as evenly as possible.
- Solicit then listen to everyone’s input.
- Don’t fight over ownership of an idea.
- Bring conflict into the open.
- Don’t assume that silence means agreement.
- Stay focused on the goals and tasks of the committee.





### Meetings

As experts on partnerships have observed many times: good meetings improve the quality of decisions, and promote follow-through. Bad meetings don't.

FWS Mentor Molly Krival has observed: "Friends boards and committees have to learn how to be efficient and productive." Although, she adds, initial enthusiasm will carry meetings to early achievements, sooner or later boards have to organize so that meeting times are closely scheduled for decisions and planning, as well as to ensure everyone can contribute ideas. It is simply not defensible for groups to wander from one thought to another. The agenda, minutes and reports should reach everyone involved before meetings with ample time for adjustments.

Building a sustainable organization depends on well-run, productive meetings. Board members will quickly become frustrated with "wanderlust" meetings that yield few, if any, results. Remember WIIFM ("What's in it for me?")—If volunteers don't feel productive and useful, if they feel they are wasting their time, they will take their energies elsewhere. It's worth investing time as a group to examine meeting culture. While the Board President or Chairperson is responsible for leading meetings, everyone on the board helps set the tone and atmosphere. It is worthwhile to evaluate what is working well and what needs to change.

Following are some considerations for improving meeting productivity and outcomes.

### Culture and Expectations

Board members develop a culture that sets the tone and expectations for meetings: Does the board expect preparation, participation and follow-through by its members? Or does the board set low expectations where late arrivals are acceptable, where discussions may wander and where one or two people are expected to do all the work?

Open a discussion about what expectations are for each meeting. The board should address what it would like to get out of its meetings and ways to improve meeting structure. Outcomes of this discussion might include: beginning and ending each meeting on time; setting and adhering to an agreed upon agenda; and arriving at meetings fully prepared to address agenda items. It is also important to establish a discussion process that ensures everyone has an opportunity to express opinions. Keep in mind, too, that socializing is important, so set aside every third meeting for an enjoyable activity on the refuge (this will help educate and build relationships too). To keep things on track, plan to revisit this discussion from time to time, especially as new members join the board.

### Meeting Preparation

Meetings need to begin with good preparation by everyone on the board (not just the President or Chairperson). Prepared members are ready to discuss agenda topics prior to the start of the meeting, making it possible to have an efficient and productive meeting. Following are some steps to help everyone be prepared.



### **Minutes**

Minutes are an important tool to guide a board. Minutes provide history, document decisions and describe actions, timelines and responsibilities. They are references that support the agenda and hold people accountable. Minutes should be succinct for readability; they should clearly document meeting history, including who was present when the meeting took place, and the formal agenda. Minutes should also address the business undertaken, and decisions made, including details of action plans. Ideally, minutes should be prepared and distributed shortly after a meeting (within a week, if possible) so everyone has a record in hand. Minutes should be amended, if needed, and accepted into the record at the next meeting.

### **Agenda and meeting materials**

Prepare and distribute agendas, financial statements and committee reports well in advance of a meeting (at least a week ahead). Early distribution allows time for comment and additions by board members. It also helps board members prepare for a meeting. Board members will have time to read materials, consider their positions and get questions answered in advance of the meeting. This makes it possible to focus meeting time on higher-level discussions, instead of reading or listening to reports.

Agendas should highlight decisions that the board must make and set a time frame for each point of discussion. Agendas should also be linked directly to the group's annual plan. To encourage strategic thinking, experts recommend that most of the agenda focus on the most substantive issues that truly need the input of a group of strategic thinkers. These issues should be closely tied to the organization's goals for the year.

To allow for enough discussion time, place more complicated issues at the top of the list, rather than at the end. Agendas should be followed, under the guidance of the President or Chairperson, but can be adjusted as long as there is a clear process in place for making changes.

### **Meeting Structure**

Focus meetings on leadership issues, such as the mission, vision, goals, planning, actions and evaluation. It is advisable to structure meetings to maximize strategic thinking. This is done by encouraging questions—including rotating an assignment of “devil’s advocate” to a different board member at each meeting. This person’s job is to challenge each idea that is presented by raising questions about risk, or how an idea helps accomplish objectives. Rotating the assignment provides everyone with an opportunity to raise questions without the risk of being labeled as a naysayer. This approach also helps create an atmosphere that embraces critical thinking and fosters a diversity of ideas.

Once committees are established, the board can focus discussions on their accomplishments, rewards and delegation of new projects—and not committee busy work (remember committees are empowered to make decisions) or listening to reports (these should be distributed and read ahead of time). Board members who are concerned about the details can join the committee of interest rather than spend board-meeting time evaluating committee work.



Many specialists in nonprofit partnerships suggest breaking meetings into bite-sized pieces, otherwise participants will feel overwhelmed and possibly lose sense of accomplishing anything. At least part of each agenda should be devoted to giving the group a feeling of being in the know, of having a chance to learn some of the exciting things that are happening in the field—or knowing more about what the organization as a whole is doing.

Here are some additional suggestions for successful meetings (from O’Connell):

- Pay attention to the niceties. Take time to figure out how to make your meetings pleasant.
- Occasionally hold your meeting in a special setting.
- Provide a regular mechanism for board acknowledgement of committee progress. This kind of thoughtfulness makes a big difference to committee members, who inevitably wonder if their efforts are really noticed and really do achieve results.
- Don’t be afraid of healthy controversy in meetings of committees, the board, or voting membership. If the cause is important, people will feel strongly about it but not always the same way. Let people debate and even argue, but keep it within the bounds and context of an organization’s meeting. If the going gets too hot, fall back on Robert’s Rules of Order to help organize the discussion and decision, but don’t let that process take control of healthy exchange.

### Robert’s Rules

When an organization is new, members commonly work toward building consensus. Consensus building is useful for creating a mission and vision; but, over time, groups need to use parliamentary procedures for decision making. Always working toward consensus can discourage discussion (especially when individuals disagree and are trying to keep peace) and can stop a board in its tracks when the issue is complex and opinions are divided. An all too common error for nonprofit organizations, specialists note, is that leaders may strive for compromise and for unanimous votes when it might be far healthier to have a split vote—provided all issues are on the table, the debate is fair and there has been sufficient time for consideration.

Robert’s Rules provides the forum for healthy discussion and democratic decision-making necessary for building a sustainable organization. All board members must learn how to use Robert’s Rules effectively and efficiently. The Rules shouldn’t encumber healthy discussion, but must be employed for making clear decisions.

*Taking Flight* (Heinze-Lacey, Mehaffey, 1997) provides a simple explanation of Roberts Rules. Another tool recommended by Brian O’Connell is *Parliamentary Procedure at a Glance, New Ed.* O. Garfield Jones, Penguin Books, 1990. This book provides an easy to follow outline of the Rules.



### The Role of the Refuge Manager and Staff

While Refuge Managers and Liaisons cannot vote or officially advise on Friends business, they play a key role in Friends meetings. They interpret Refuge regulations, identify Refuge needs, communicate about ongoing projects and issues and offer guidance to the Friends about how they can best support the Refuge. Managers provide leadership during meetings and use this time to build relationships, develop rapport and show their commitment to the Friends and the collaboration. Managers also provide direction to Friends, guiding members towards appropriate activities and steering them away from unsuitable projects. Some Managers feel it is important to attend every Friends meeting, others attend many meetings, but delegate a staff liaison to be the key Refuge representative. Either way, this commitment by the Refuge makes for a strong collaborative relationship with the Friends.

### Additional Resources

See <[www.businessballs.com/meetings.htm](http://www.businessballs.com/meetings.htm)> for an excellent article on running meetings by Alan Chapman (1995–2005).

See <[www.refugeassociation.org](http://www.refugeassociation.org)> the NWRA website, for a downloadable PDF version of *Taking Flight*.

## Communications Systems

In their 1994 *Collaboration Handbook*, Winer and Ray noted that: “The more people involved, the greater the number of communication bonds; the greater the intensity; and the greater the difficulty of learning about each other, balancing power, having time to speak, scheduling meetings, sending out meeting summaries, creating ownership, being productive, and so on.”

Being able to communicate plans, the status of activities, new opportunities and potential problems is critical to a well-functioning board and a strong partnership. Following are some points to consider for creating effective communications systems.

### Timely Communications

It is difficult for board members to be effective if they must wait until the next meeting to review and discuss meeting minutes, new opportunities or problems. Meeting minutes should be distributed shortly after a meeting. This record holds everyone accountable—it is a reminder of action plans and expectations. Telephone and/or e-mail systems need to be established to communicate important new information in between meetings. Waiting until a meeting to provide a long litany of events wastes meeting time and denies board members the opportunity to gather information and consider positions before the meeting occurs.





### Share with the Whole Team

Good systems need to be in place to ensure information flows well between all members of the partnership. This doesn't mean everyone must be included in everything, only that each person receives information appropriate to his/her needs. For example, the Board President may have a weekly meeting with the Refuge Manager to check in on the status of plans. Everyone on the board doesn't need an e-mail or phone call to detail these meetings. If new issues are raised, however, these should be communicated to everyone. For other types of communications, such as meeting minutes, newsletters and action plans, everyone in the collaboration must be included. Friends/Refuge partners should discuss communications systems and consider who will be included for what type of information, as well as who is responsible for distributing the materials.

### Put it in Writing

All decisions, action plans, activities, meetings and committee reports need to be documented in writing. Documentation should be succinct, noting key points, not a wordy description of everything said in a meeting. If e-mail is used extensively, the Board Secretary needs to keep a paper trail and topics can be archived for future reference.

### Use Technology Well

Some Refuges are spread over great distances making it difficult to institute effective communications between partners. In addition, board members may live an hour or more from each other and,

particularly at Refuge Complexes, Refuge managers and staff may be headquartered hours away. In these cases, technology supports immediate communication and should be utilized to its fullest capacity.

### The Right Tool for the Task

E-mail and phone conferencing are excellent methods of communication, but to be effective, they need to be well managed. Defining a protocol for use may be helpful and can prevent abuse of these tools. For example e-mail can be used to post factual information on progress toward the meeting the annual plan (financial reports, committee reports, agendas, minutes and updates), but not to post personal issues or concerns. Phone conferences can be used to discuss issues that are inappropriate for e-mail, but conferences must follow a posted agenda to which everyone has provided feedback. Remember that technology supports communication. Technology should not completely replace face-to-face meetings because meetings are so important to relationship development and effective problem solving.

### A Group Effort

An important role of the Friends President or Chairperson is to facilitate communication, but it's everyone's job to ensure systems work well. For example, if a board member doesn't receive the minutes, s/he should ask for them in advance to avoid arriving at the meeting unprepared. If minutes aren't being prepared in time, everyone needs to work together to solve the problem (perhaps a new Secretary is in order). To effectively function, board communications must be timely and complete.



## Membership Development

Attracting and keeping members is critical to the long-term success of the Friends/Refuge collaboration. Members are the lifeblood of the Friends organization, bringing volunteers, connections, funds and new leaders to the group. Here are some considerations regarding membership development.

### Work Together

It cannot be effectively done by the Friends board alone. Because the Refuge is a draw to potential new members, the Refuge Manager and staff are in a unique position to support Friends membership and leadership development. Public interactions with Refuge employees “flavor” their impression. Constituents who have a positive experience will positively view the Refuge and Friends and will want to join partnership efforts.

### Take Time to Do it Right

It’s best to start slow and offer a handful of well-run programs and volunteer opportunities than it is to overreach and be ineffective. For each activity, there should be a plan in place that states what is to be accomplished, who is going to do the work, what resources will be needed (and their source) and how outcomes will be assessed.

### Have a Recruitment Strategy

Sustainable Friends/Refuge partnerships take an organized, strategic approach to membership. They carefully consider: where to look for new members, what will attract them and what will keep them interested. Most important, perhaps, is this consideration: what benefits will help members decide to move from simply paying dues to becoming active volunteers—and then leaders of the organization. These partners take seriously the principles of “WIIFM” (What’s in it for me?). It is vitally important to offer opportunities and programs that have personal value to members. Successful partnerships incorporate membership development into every aspect of what they do, recognizing that new members bring fresh energy and ideas to both the Friends organization and the partnership.

### Develop Sound Systems

Members expect regular communications, such as newsletters, reminders about renewing membership and notices about events. Annual budget planning requires knowledge regarding how many people are members and what to expect for dues each year. An up-to-date database is essential for recruiting volunteers. All of these things require a well-organized, computerized system. To be effective in membership development, plans must include creating and maintaining a solid computerized membership tracking system.



### Make it Fun

Many Friends/Refuge partners struggle with membership development. In some remote and rural areas, it can be challenging to find people as potential members because many in the available pool may already be engaged in other activities. In more populated areas, competition can be quite intense, with many other nonprofits vying for members and volunteers. In either case participation in the Friends/Refuge partnership must be demonstrated to be a highly valuable experience. If people enjoy themselves, they'll keep coming back and bring their friends along, too. It's important to realize that membership development is closely tied to everything a partnership does. A well-run, visible partnership that celebrates success and honors its constituents will draw new members regardless of how big or small the community.

### Additional Resources

For a thorough discussion on membership development, see: Heinze-Lacey, Beverly. (2000). *Building Your Nest Egg: An Introduction to Raising Funds for National Wildlife Refuge Support Groups*. Washington, DC: NWRA.

## Finances

Financial planning and management is a critical function and legal responsibility of the Friends Board. Everyone on the board, not just the Treasurer, must learn to read and interpret financial statements and everyone must participate in planning for the financial stability of the organization. Even young, small organizations that run on a shoestring budget need to follow acceptable accounting practices. It is important to get into the habit of producing a monthly income and expense statement, balance sheet and budget status report. These should go to the board of directors and executive committee in advance of their meetings.

### Develop a Strategy

Friends/Refuge partners must work together to set realistic expectations for setting budgets and raising funds. Partners consider what they want to happen for the future, what resources will be needed, where these will be found and then closely tie their budgets to action plans.

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*“Too much emphasis is being placed by the FWS and Friends on ‘We’ve got to have a visitor center; we’ve got to raise \$1 million.’ Blackwater has been in business since 1987. We didn’t take on a multi-million dollar project in 1989. The visitor center has been the last thing Blackwater has done. It’s important to be realistic—identify what can be accomplished, make it happen and build on the accomplishments.”*

Glenn Carowan, Manager, Blackwater NWR



### Create a Realistic Plan

It's a myth that volunteer organizations can manage with little money and equally false that a Friends group must raise large sums of money in order to succeed. Among other things, the ability to raise funds is tied to the maturity of a Friends organization (see table below) and setting expectations too high will discourage the partners and lead to board burnout.

Friends organizations with generous budgets tend to be mature organizations (median age 15 years). These groups have a long-established relationship in the community and a track record that makes it possible to raise large amounts of money from a wide variety of sources. The capacity for younger organizations to raise funds is more modest, which must be considered in the planning process. In most of these cases, expensive projects (e.g., capital improvements) are unrealistic in the short run, but with strategic thinking and financial planning, more ambitious goals will become possible in time.

### Raising Funds

While FWS employees are not allowed to raise funds by law, Friends fundraising is a partnership effort. The partners must work together to create a compelling case for making donations, as well as to nurture those relationships that lead to donations. Donors need to hear a unified message from the partners and see that the Friends have the support needed by the Refuge's administration to make a project succeed. Donors need to believe they are giving to a worthy cause and that their funds will be well spent. Donors need to feel connected to the cause to which they are making a contribution. The strength of the Friends/Refuge partnership brings credibility to the Friends organization and gives donors a sense of security about making a contribution.

Here is a checklist that offers suggestions on managing funds (from O'Connell):

- Create realistic budgets. It's too easy to get carried away with unduly optimistic income projections and unrealistic expectations.
- Create regular monthly reports and ensure they are accurate.
- Understand the financial picture and the reports. It's better to look silly than not to pursue a part of the financial picture or report that you don't quite understand... the board members are ultimately responsible, and you have to understand it.

### Report on Annual Budget/Expenses

FWS Refuge Friends Organization Survey (2006)

Annual Budget/ Expenses	Median Age in Years (Range)	No. of Friends Groups	% of Total Friends Group Respondents
< \$500–5,000	6 (0–28)	48	41%
\$5,001–10,000	8.5 (3–36)	15	13%
\$10,001–50,000	9 (1–38)	32	28%
> \$50,000	15 (1–69)	21	18%
<i>Grand Total</i>		<i>116</i>	<i>100%</i>





- Involve all key leaders in developing the budget.
- Recognize how easily the budget can thwart or contradict the board's decision on priorities. Despite good planning, you may not have enough money for something important.
- Provide a cushion and basic reserves in the budget. Nonprofit agencies should have reserves equal to at least one-half of one year's operating expenses.

### Additional Resources

*Building Your Nest Egg* (Heinze-Lacey, 2000) is a National Wildlife Refuge Association and US Fish and Wildlife Service guide dedicated to Refuge Friends Organization fundraising.

## Weathering the Storms—The Resilient Organization

### Manage Transitions Well

Change is a constant factor for Friends/Refuge partnerships. Refuge managers and staff retire or move, Board terms end, and life changes can draw people away from the organization. One danger is to depend on one or two dynamic leaders to drive the partnership. When these leaders move on, the Friends/Refuge collaboration suffers and may have difficulty recovering. In sustainable collaborations, members shift the focus from individuals to the organization and build a culture where everyone is responsible for managing and cultivating the partnership.

Each of the partnership stories and profiles featured within this handbook exemplifies embracing change as a tool for growth. Without change, the partnership will stagnate. Without managing change, the partners risk becoming stuck in a state of continual storming. The organizational missions and the collaboration's vision, goals and plans provide the foundation for managing transitions. These guideposts clearly set the expectations, making it possible for new leaders to readily pick up where former leaders left off.

Managing change means using strategic thinking to plan for the future. Sustainable Friends/Refuge collaborations find stability by focusing on the vision of the partnership, consciously nurturing new



leaders and continually improving their systems for developing the organization. As the collaboration's needs and community change, partners must also be ready to "adjust even its fundamental mission, vision and goals to match new conditions or new learning." Mattessich (2003).

### **Prevent Stagnation**

It's not uncommon for a new Friends/Refuge collaboration to experience a period of high enthusiasm and activity and then to hit a point where excitement and participation wane. A period of stagnation may ensue and as long as there is some level of funding and support, this period can last for some time.

Here is a list of some of the characteristics and warning signs of a stagnant organization (from Connolly and Klein):

- Programs are obsolete; demand for programs declines; few new programs are developed
- Focus is on operations; objectives are unmet
- Board members are entrenched, unenthusiastic, minimally involved
- Morale is poor; communications are poor; turf battles crop up
- Focus turns to individual program goals and "fiefdoms" rather than overall mission
- There are few or no new revenue sources
- Systems and procedures are outdated
- Planning is inadequate

Strategic planning, experts advise, is an important tool to prevent stagnation from occurring. Norm Penner, President, Friends of Tualatin River NWR, suggests that his group has learned that having a strategic plan isn't enough—the plan must be evaluated regularly and updated. As partners consider the list above—they should ask themselves if more than four of the above characteristics describe their group. If so, it is possible to correct the situation by going back to the drawing board and applying some of the items listed below.

Here is a list of suggested techniques to deal with the symptoms of stagnation (from Connolly and Klein):

#### **Seek new leadership**

The Board should create a profile of qualities needed in new leaders before searching for potential candidates.

#### **Assess and develop programs**

Consider the needs of constituents and outcomes desired during the assessment, which will help in designing new programs.

#### **Increase the organization's visibility**

Keep constituents informed as goals and programs are revised. Evaluate and improve how information about activities and accomplishments are conveyed.

#### **Evaluate the organization's systems and structure**

Consider what skills are needed, what procedures need to change.



### **Raise funds**

Maintain funds for a lack of funds makes it difficult to manage the organization. “The aim of a fund-raising plan when an organization is in trouble should be to capitalize on plans for changes and improvements...”

### **Improve financial management**

Drop non-essential services and develop financial plans to support new programs.

### **Board Development**

Discuss commitment with each Board member and revise the Board structure and processes to reflect needs. Some Board members may resign and others with new skills may need to be recruited. “In times of trouble, governance might not seem an urgent issue. But formal board development can be of immeasurable benefit in the long run.”

Friends/Refuge partners in a stagnating collaboration may find themselves disappointed in and increasingly critical of each other. An important tool for fighting stagnation is to examine the collaboration’s history—to honor and celebrate the successes while acknowledging the need to make changes. Evaluating—and celebrating—history can help nurture the relationship and be a stimulus to move out of a declining stage of development.

### **Manage Conflict**

Many, and perhaps most, people strive to avoid conflict. They perceive it to be a negative in all instances. But there is another perspective about conflict that must be examined: prevention of conflict at all costs limits the ability to change. Thus, instead of avoiding it at all costs, its possibility should be acknowledged and built into the life of the group. Conflict should be expected from time to time; and when it occurs, it should not be avoided but managed.

Being able to effectively manage problems and solve conflicts is a critical step toward building a sustainable collaboration. When board members and Refuge partners build a foundation of trust and respect it helps to create a culture that encourages healthy debate and effective problem solving. As Patrick Lencioni noted in his 2002 book, *The Five Dysfunctions of a Team*: “By building trust, a team makes conflict possible because team members do not hesitate to engage in passionate and sometimes emotional debate, knowing that they will not be punished for saying something that might otherwise be interpreted as destructive or critical.”

The The Guiding Principles for the Friends/FWS relationship (Appendix A) provide a foundation for building trust and respect. Friends/Refuge partners that subscribe to these Principles find they are better able to manage difficult situations without falling into destructive conflicts. When disagreements occur, members are able to trust that choices will be made in



the best interest of the partnership, not based on personal agendas. Below are a few of the typical sources of conflict in a collaboration (from Weiner and Ray):

- Power struggles
- The wrong people
- Low trust
- Vague vision and focus
- Incomplete desired results and strategies
- Lack of clear authority

Another source of conflict in a Friends/Refuge collaboration is that some Friends members don't initially understand how the National Wildlife Refuge System is managed and some Refuge staff do not understand how an independent 501(c)3 nonprofit is managed. It's up to the Refuge manager and staff to guide and educate new Friends members about refuge management issues and it's up to the Friends to educate Refuge staff about how a nonprofit entity is managed. Kelby Ouchley, Manager at Black Bayou Lake NWR, reports spending significant time on education from the time that the Friends of Black Bayou Lake NWR began. Today, Ouchley notes, the Friends have become the educators and "head off incompatible ideas before anyone has a chance to seriously consider them."

A first step to deal with conflict is to acknowledge that a problem exists. The conflict may be masked and difficult to perceive at first. Some people evince disagreement by being quiet. Others simply stop coming to meetings. While it is admittedly difficult to do, someone—the initiator, the convener, a member of the group—must find the courage to ask, "What's going on here?" That simple but essential question is often enough for people to start talking and dealing with conflict.

Once a problem is identified, the group needs a process to come to resolution. A good place to start is to revisit the mission and vision of the Friends/Refuge collaboration—and framing the problem within this reference is a good place to start.

On a final note, O'Connell (1993) offers the following: "Obviously, peacemaking should be the order of the day, but once in a while it's not the best course to follow. Occasionally, it's better that people lose and move out of the mainstream...There are times—not often, to be sure, but there are times—when it's better to let some people fall away or go away mad. This may not seem fair—a contradiction to the kind of spirit that voluntary organizations try to generate, but some people and some controversies are better moved out, so the organization can concentrate on what the clear majority wants to do. Remember that an organization can sustain only so much controversy."





### Avoid Personal Agendas

Turf issues and hidden agendas can cause collaborations to fail. Partners have to focus on the results they want, and take active steps to create productive relationships. In such relationships, turf issues and hidden agendas fade away. Instead, everyone's self-interests are out in the open and legitimized. Conflicts can then become the source of honest dialogue among partners in relationship with one another.

One of a Refuge Manager's greatest fears is that one or more leaders of a Friends organization will "use" the organization to push their personal agendas. Personal agendas are incredibly destructive to a collaborative relationship; they cannot and should not be allowed to drive the Friends organization or the partnership.

To prevent personal agendas from entering the Friends/Refuge collaboration, *everyone* must commit to the Guiding Principles (Appendix A) and agree to focus on the collaboration's vision and purpose that set the boundaries for the relationship. Everyone must take responsibility for managing those boundaries, and that includes speaking out when a member is "out of bounds." And it could even mean asking members who cannot honor the relationship and its boundaries to step

down from the board. Ultimately, creating a culture that focuses on the collaboration, not on personal agendas, requires that Friends/Refuge partners take all the steps previously described. They must define the relationship, educate new members, cultivate leaders and set directions. These steps will help build the trust and respect required for a successful collaboration; conversely, neglecting the steps sets the stage for conflict and personal agendas to take hold.

### Additional Resources

For an excellent resource on managing conflict see:

Angelica, Marion Peter. (1999). *Resolving Conflict in Nonprofit Organizations*. Saint Paul: Amherst H. Wilder Foundation.

For a variety of excellent web-based articles on organizational development, see: Nonprofit Management Solutions, Inc at <[www.nonprofitmgt solutions.com](http://www.nonprofitmgt solutions.com)>. □



# BLACK BAYOU LAKE NWR

## Vision, Trust and Education Spells Success

When Black Bayou Lake NWR was established in 1997, Refuge Manager Kelby Ouchley realized he had a tremendous opportunity to do something new. Unlike the other refuges in the North Louisiana Wildlife Refuge Complex, where traditional public uses focused primarily on hunting and fishing, Black Bayou Lake NWR was close to Monroe, Louisiana, and an ideal place for providing environmental education and interpretation. Kelby saw the potential for a Friends organization to flourish and decided it was time to start a partnership.

Manager Ouchley placed an advertisement in the newspaper inviting the community to attend a meeting to start a Friends organization. The meeting was well attended. Ouchley knew what he wanted and his vision resonated with people in the room. Indeed, Friends President Ann Smith states, “Kelby had vision all over the place!” and this vision has been key to the partners’ success.

In less than a decade, the Friends of Black Bayou Lake NWR evolved from a start-up organization (established 1997) to being named the 2005 Friends Group of the Year by the National Wildlife Refuge Association and the National Fish and Wildlife Foundation. Today there is a strong collaboration between the Friends and the Refuge. Yet, as Manager Ouchley notes, it was a learning process for him as well as the Friends: “It took time for me to understand that the Friends were not a ‘sudden thing.’” Ouchley and Smith offer their advice for creating a sustainable and successful collaboration:

### Seek Diversity

Ouchley was at first reluctant to ask “non-traditional constituents” to join a Friends/Refuge collaboration because he feared their goals and interests might be inconsistent with those of the Refuge. However, he recognized that his vision required reaching beyond the traditional supporters and visitors. Ouchley relates: “We hit every single civic club, garden club and organization in town. This recruiting effort gave us a high profile and brought in a lot of people.” As a result, the Friends immediately attracted a wide range of talents that have contributed greatly to their success. Indeed, some of the biggest supporters and leaders are people he never thought of as constituents. Ouchley adds, “many had almost no outdoor experience!”

### BLACK BAYOU LAKE AT A GLANCE

#### The Refuge

- Located in Monroe, Louisiana (Pop. ~150,000)
- Established in 1997 to protect and enhance habitat for endangered species, waterfowl, neo-tropical migrants and resident wildlife.
- 4,500 acres of wetlands associated with a 1,600-acre shallow, cypress-studded lake, riparian areas and reforested farm fields within the watershed.
- Provides excellent habitat for wetland-dependent fish and wildlife, such as waterfowl, wading birds, neo-tropical migrant song birds, reptiles and game fish, including several endangered red cockaded woodpecker clusters.
- Visit <[www.fws.gov/northlouisiana/blackbayoulake](http://www.fws.gov/northlouisiana/blackbayoulake)>

#### The Friends

Established: 1997  
 Membership: 500  
 Annual budget/expenses: \$20–30,000  
 Visit <[www.friendsofblackbayou.org](http://www.friendsofblackbayou.org)>

#### Mission

Committed to community stewardship through preservation and restoration of the natural environment as well as increased public awareness, appreciation, education and responsible recreational use.

#### Accomplishments

- Renovated 1880s planter’s home to be refuge visitor center
- Built and donated Conservation Learning Center to FWS
- Built 400 foot pier, one mile nature trail/boardwalk, photo/bird blind, wetlands art project with trail
- Establish educational programs on and off refuge.

## Education and Communication Leads to Trust and Empowerment

Manager Ouchley believes one of his most important jobs in the relationship is to educate. “Most people simply don’t have a good grasp about what refuges are or their specific management goals and objectives. It is important to start the education process early—and then recognize it’s a continuing process.” Ouchley initially focused on the “Wildlife First” mission of refuges and explained about compatibility, refuge objectives and purposes. He also immediately established ground rules: “There will be times I will say ‘no’ to an idea. I am legally responsible to abide by certain rules.” He notes there were initially many instances when the Friends decided something and he had to say, “That isn’t going to happen.” Wisely, Ouchley would not simply veto an idea. He would offer alternatives whenever possible.

Ann Smith reports that Ouchley attended all of their meetings and helped the group figure out how to work as a partner. She says that his involvement has been critical to the organization’s success. “Kelby has led—no, that’s not the best word—Kelby has *guided* us so well. I don’t know that we could do it without his help.”

President Smith notes that not only did Ouchley offer guidance, but Friends members also took responsibility for their own education. Some have attended every Friends conference and workshop and used the resources offered by the National Wildlife Refuge Association to learn about and the federal budget processes that affect refuges. She reports that this education has made it possible to build a trusting relationship. Both partners understand the boundaries within which they work. “Members respect and understand Kelby’s position because they have been taking the time to learn the FWS System.”

## Have a Vision and Work on a Significant Project Early On

Smith reports that having a vision of what’s possible has been central to their success. She says that Ouchley was particularly helpful in this area. “His vision was *huge*!”

The Friends of Black Bayou Lake’s first project was to move and renovate a dilapidated 1880’s plantation house. The house was slated to become a visitor center. Smith notes: “The house was a dump. It was rotting, with huge holes in it. Our founding President, economist Bob Eisenstadt, thought it would be smarter, and certainly cheaper, to start from scratch.” But Ouchley saw things differently: “This was something the group could look forward to, show folks in the community—it gave them a purpose, something better than picking up litter.” It was this vision that gave the group its focus for the first four years of its existence. This singular focus helped to build cohesiveness and a great sense of participation and involvement.

Ouchley has seen other Friends groups suffer from a lack meaningful projects and activities. Ultimately, he observed, these collaborations are not satisfying to their Friends group and don’t succeed. At Black Bayou Lake NWR, reaching high has paid off. Ouchley notes. “I never come to work that I’m not surprised at what we’ve accomplished in this small and relatively resource-poor community.”

## Realize that Organizations Go Through Stages

The Black Bayou Lakes group’s first “danger point” occurred at the completion of the house renovation project. Absent the focus for their enthusiasm and the community connections it created, the group could easily have felt directionless. Ann Smith emphasizes that it was important for them to realize that organizations go through stages. To avoid the predictable feeling of “let down” that can follow completion of a large project, it has been helpful to have another ongoing project to provide a renewed focus for their energy. “Don’t be afraid to take that next step,” Smith notes, “and change the identity of the group somewhat, to morph into the next incarnation.” > >

## Leadership Style is Important

Smith has observed that when the group first started, it needed a leader who could provide direction and take charge. The organization was lucky that its first president, Bob Eisenstadt, had this type of personality and leadership style. As time has passed, the group has not required such specific direction. Instead, the organization now focuses on cultivating new members who will take charge of the organization's expanding roles. She believes her leadership style fits the bill for the group's current "incarnation." She likes to delegate and "gets a kick out of figuring out what people's talents are and giving them things to do, getting capable people involved and keeping them involved."

President Smith says that leaders of mature groups are best advised to let go of some of the control, to share power by delegating and avoiding micromanagement. She likens her leadership approach to her role as a mother and watching her children mature: "You want them to do things on their own and not be dependent on you." This approach has built tremendous strength and stability into the organization. No one person alone is responsible for the organization's survival. Members, even new members, show ownership in the organization, taking on projects with confidence and pride.

## Balance Work with Fun

Accomplishing good works is usually not enough to sustain an organization over time. Every project must include sufficient enjoyment so that volunteers donating their talent and labor feel motivated to participate and come back. Smith says, "Tramp around on the refuge; keep reminding yourself and the group that this is a great thing. Don't get bogged down in the business. Having fun is critical...this is 'my' refuge and it makes me feel grounded. I am so lucky—I am so fortunate—to have this Refuge and the Refuge System in my life. It's because I flat love it. It enriches my life." □



MARTI SCHUTZ

Birdwatching at Black Bayou Lake NWR